

# **COACHING & DEVELOPMENT PROCESS**

**Presentation for Staff  
Prepared by the Office of Human Resources  
Mott Community College**

**RTC AUDITORIUM  
March 31, 2005  
April 6, 2005**

## **Background**

### **Why should we have and document ongoing dialog about employee performance?**

1. Board of Trustees Direction
2. NCA Criticism: “The evaluation of personnel should be consistently applied throughout the College.”
3. One of our strategic objectives
4. Required by several of our CBAs
5. It’s simply a good management practice

*We were ready to start this after job evaluation (two years ago) but unions asked us to hold off.*

### **What are we trying to achieve with this process?**

1. Help employees grow, develop, improve, succeed and contribute to the organization.
  - Both employee and supervisor identify barriers to employee success and growth and develop plans to overcome these barriers.
  - Identify and implement individualized training and development plans; focus on employee developmental goals.
2. Linking individual behavior with organizational goals, plans and values.
  - In combination with new job descriptions, provides process for communicating accountabilities to employees and holding them accountable, thereby creating an organizational culture more focused on outcomes and results.
  - Set specific objectives for project-related activity for employees and teams. Objectives linked to elements of strategic plan as appropriate (recognizes that departmental needs, which may differ from organization-wide needs, also need attention and focus).
3. Summarize and document the ongoing dialog between the supervisor and employee on performance and development. By initiating this process, we’re creating a framework for supervisors to begin and continue this throughout the year.
4. Document past employee strengths, accomplishments, contributions and successes as well as areas needing improvement and shortcomings.
  - Document the failure to meet performance expectations; ensure consistency with documentation of corrective action program.

**By-product** – Provides opportunity to reconsider, update job description.

## How Does It Work? What Will Happen When?

### March–May 2005

1. Refresher orientation for managers and supervisors (March 7, 2005).
2. Employee orientation – today
  - Supervisors have been asked to review the process with their employees at staff/departmental meetings as well.
3. Supervisors and employees prepare for employee meetings
  - Supervisors to give employees advance notice of the meeting; discuss with employees individually or as a group how the process will work and what is expected of them. Explain that this is to begin the implementation of a pilot Coaching & Developmental process the College has initiated for staff. Emphasize that the process is designed to facilitate ongoing dialog about expectations and performance.
  - Supervisors to give employees a blank form so they can prepare for meeting.
  - Employee and supervisor make notes for discussion on each page of the form prior to meeting/discussion.
4. Hold discussions
  - Employee and supervisor meet to review Employee Input Document and supervisor's draft of Coaching & Development Form. Discussion during meeting covers four sections of the form:
    - ✓ Employee performance during the past year
    - ✓ Employee developmental goals for upcoming year
    - ✓ Barriers to employee success
    - ✓ Project planning for upcoming year that links, in part, to College's strategic plan.
  - Incorporate ideas from both supervisor and employee into **DRAFT** form.
  - **FORM NOT FINALIZED UNTIL JUNE 2006.**
  - Copies of draft forms should be kept by both supervisor and employee.
5. Supervisor sends email to HR indicating that employee and supervisor have met. Supervisors should tailor this note to the particular situation. For example, if the employee's performance is considerably substandard, there should be an appropriate reference to this. ("I discussed concerns that I have about his/her performance in three key areas." Or, if you've been coaching someone with performance problems, this should be clearly documented.)

### June 2005–June 2006

1. Observe and coach employees
2. Create documentation and back up for year-end summary

*Tell employees when you create documentation from coaching session.*

## **February 2006 and AS OFTEN AS NEEDED**

1. Meet with employee to:
  - Summarize performance observations and coach
  - Review progress against initial plans/goals contained in the form
  - Discuss whether this process is working; if not, identify alternatives
  - Drop file concept

## **April–May 2006**

1. Determine if current form and process is good fit for our organization; if not, identify alternative.
2. Solicit both employee and supervisor input as part of this process.
3. Design training for new system, if applicable.

## **May–June 2006 – Formal Discussion with Employee**

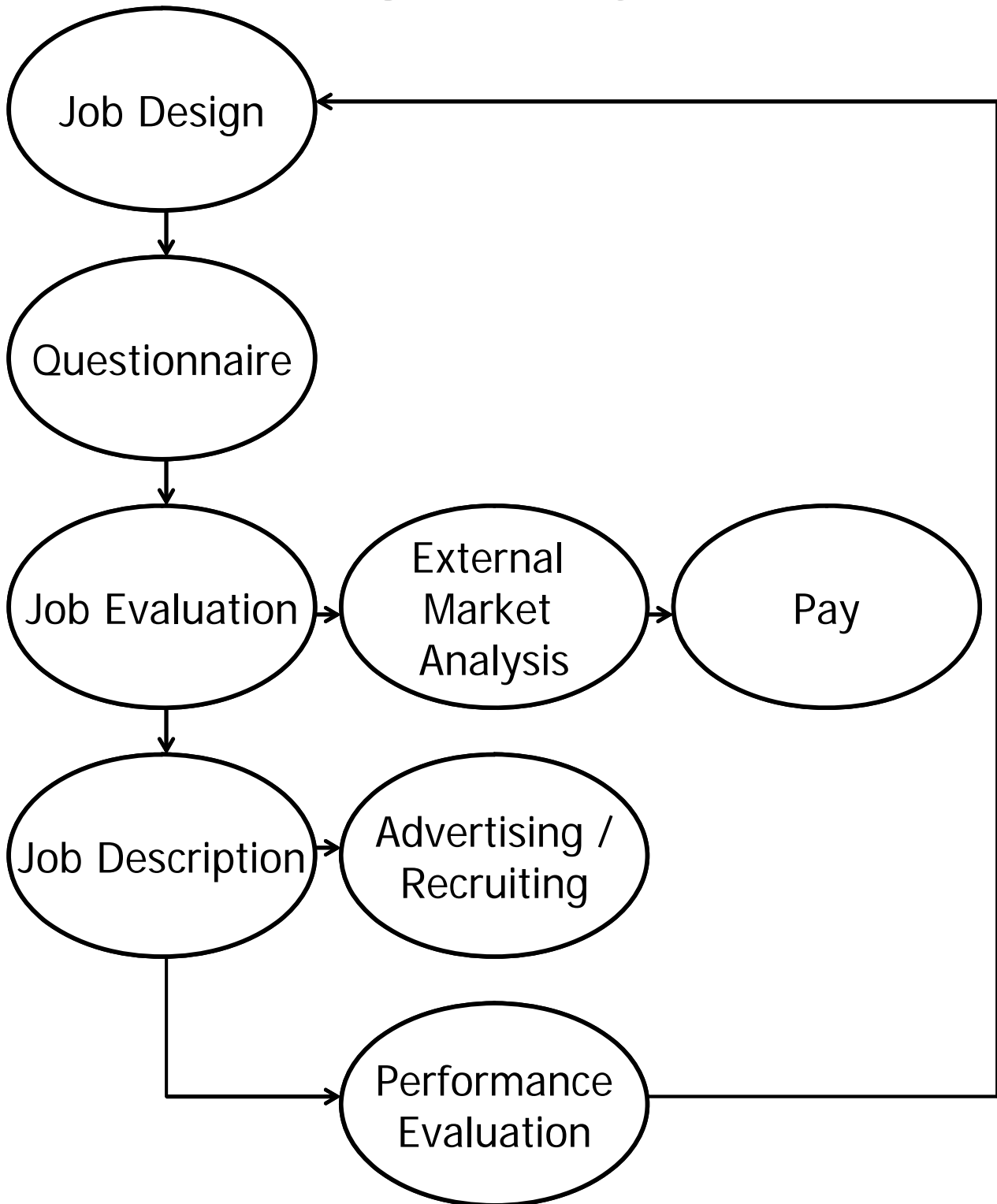
- Arrange appointment with employee in advance. Remind them to update their copy of the Coaching & Development form.
- Supervisor updates his/her copy of form.
- Hold discussion meeting. Review employee and supervisor notes at meeting, section by section. Explain to employee how you intend to complete the final form.
- Ask them what they think about this process and how it could be improved.
- Finalize the form by providing a copy to employee and ask them to sign. If they refuse, simply annotate on form, “Completed form provided to employee on <DATE> and employee refused to sign.”
- Supervisor forwards package of final Coaching & Development form, Supervisor Summary and Employee Input Document to his/her supervisor for review. Number of managers required to review package will be determined by VPs in each area.
- Final manager in review process forwards package with original signatures to HR.
- Final package filed in employee personnel file in HR.

NOTE: Goals and Assignments for FY 2006-2007 determined in this process.

## **July 2006**

1. Conduct training for new evaluation system if current system is modified.

# Job Evaluation as Part of HR Management System



## **Review of “The Form”**

### **Performance evaluation looks back into the past and forward into the future**

1. Sections A-C consider both past and future.
2. Section D is exclusively future-oriented.

### **Our form and process are consistent with the language regarding employee appraisals contained in labor contracts**

1. Jointly established, specific, time-phased, measurable objectives and standards of performance for each of the major work activities which is to be signed by both parties.
2. Reviewing and assessing progress made in meeting the established objectives and standards.
3. Planning and implementing a plan for the removal of barriers to the realization of the objectives.
4. Revising the stated objectives and standards in light of changing circumstances.

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**Section A – Significant Performance Expectations**

*These may be found in: the employee’s job description or questionnaire; various departmental or operational documents, statements or plans (such as mission statements, annual/quarterly business or work plans); College-wide planning documents; or they may reflect important goals and project assignments identified at the beginning of the annual cycle.*

<p style="text-align: center;"><b><u>Performance Expectation Factors and Source Document</u></b></p>	<p style="text-align: center;"><b><u>Accomplishments and Other Comments</u></b></p>	<p style="text-align: center;"><b><u>Areas Where Performance Improvement Would be Beneficial; Performance Concerns/Shortcomings</u></b></p>
<p><u>Objective 1</u> – Identify opportunities for growth  <u>Objective 2</u> – Link individual behavior with organizational values, plans  <u>Objective 3</u> – Summary of ongoing dialog  <u>Objective 4</u> – Documentation of strengths and weaknesses</p> <p>Metrics should be clearly stated</p> <p><u>Example:</u>            Ensure that labs are properly prepared in adequate numbers to enable instructors to start experiments at the beginning of the class</p>	<p><u>Two major areas of focus:</u></p> <ol style="list-style-type: none"> <li>1. Output – the work the employee is expected to accomplish               <ul style="list-style-type: none"> <li>• Recurring tasks</li> <li>• Special projects</li> </ul> </li> <li>2. Behaviors – how they conduct themselves as a worker, employee</li> </ol> <p>Can be individual accomplishments or team</p>	<p>Note: Just because it’s in this column doesn’t mean it’s a shortcoming!!</p> <p>Accurate            Fair            Job Related            Observed, representative behavior            Adequate documentation</p> <p>Don’t try to cover too much at once; concentrate on a few key objectives</p> <p>Can be related to individual or team performance</p>

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**Section B – Developmental Goals**

*Areas of knowledge, performance and skills where employee and/or organization can benefit from employee improvement and/or growth.*

<p style="text-align: center;"><b><u>Area of Knowledge, Skills or Performance</u></b></p>	<p style="text-align: center;"><b><u>What Employee Will Do</u></b> <i>(List specific planned developmental improvement actions)</i></p>	<p style="text-align: center;"><b><u>What College/Supervisor Will Do</u></b> <i>(List specific planned developmental improvement actions)</i></p>
<p><u>Objective 1</u> – Identify opportunities for growth <u>Objective 2</u> – Link individual behavior with organizational values, plans</p>	<p>Don't try to cover too much at once; concentrate on a few key objectives</p>	

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**Section C – Barriers to Employee Success**

*Identified by employee and/or supervisor.*

<p align="center"><b><u>Barrier</u></b></p>	<p align="center"><b><u>What Employee Will Do to Overcome Barrier</u></b> <i>(List specific planned developmental improvement actions)</i></p>	<p align="center"><b><u>What College/Supervisor Will Do to Help Employee</u></b> <i>(List specific planned developmental improvement actions, especially systems improvement actions)</i></p>
<p><u>Objective 1</u> – Identify opportunities for growth</p> <p><u>Can be:</u></p> <ul style="list-style-type: none"> <li>• physical resources (tools, materials, supplies, etc)</li> <li>• structure/process, information/knowledge</li> </ul>	<p>Don't try to cover too much at once; concentrate on a few key objectives</p> <p>Action plan can be something that will be done jointly by employee and supervisor</p>	<p>NOTE REFERENCE ABOVE TO SYSTEMS IMPROVEMENT</p> <p>Action plan can be something that will be done jointly by employee and supervisor</p>

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**Section D – Project Assignments**

*Assignments for next \_\_\_\_\_ months (must include how this job will contribute to/link to the College’s strategic plan).*

<p align="center"><b><u>Assignments</u></b></p>	<p align="center"><b><u>What Employee Will Do</u></b> <i>(List specific planned actions)</i></p>	<p align="center"><b><u>What College/Supervisor Will Do to Help Employee Complete Assignment</u></b> <i>(List specific planned actions)</i></p>
<p><u>Objective 1</u> – Link individual behavior with organizational values, plans</p> <p>Don’t try to cover too much at once; concentrate on a few key objectives</p>		

**Section E - Other Comments** *(Attach additional sheets)*

\_\_\_\_\_  
Employee Signature

